



WHATCOM CHORALE

STRATEGIC PLAN 2007-2008

Bellingham, Washington
www.whatcomchorale.org

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Pam Head
Mary Jackson
Soonja Nienaber
Terry Parakh
Gerry Prody

Mary Ann Ward

WHATCOM CHORALE AND CHORALE SINFONIA

STRATEGIC PLAN 2007-2008

INTRODUCTION

Historical Background

Formed in 1972 from a small group of local singers interested in madrigals, today's greatly expanded Whatcom Choral enjoys an international reputation for its ambitious repertoire and high quality performances that are the products of a generation of dedicated musicians, directors and audiences. Beginning with its first concert of Bach's *Christmas Oratorio*, the "New Whatcom Choral Society", initially under Dr. Robert Scandrett's leadership, flourished during its first two decades through associations with the Whatcom Community College (1975-1993), the Mobil Foundation, Motettenchor Stuttgart, and Seattle Symphony Chorale. While presenting major performances and taking an active part in the performing arts community of Whatcom County, the Society's musical horizons rapidly expanded during the 1980s. In 1986, a highly successful European concert tour of formal choral works, operatic choruses and American music included Birmingham England (the Prince of Wales's Trust Concert with the Seattle Symphony Chorus and the City of Birmingham Symphony Orchestra and Chorus), as well as Stuttgart Germany and Dubrovnik Yugoslavia.

After Dr. Scandrett retired in 1987, the group matured under Jack Frymire's leadership for a year, incorporated as a non-profit corporation, adopted by-laws and elected its first Board of Directors. The name of the group was also changed to Whatcom Chorale, and it selected Richard Asher as Director. He introduced the choir to a wide range of musical experiences, including in-rehearsal vocal training and summer classes, as well as audience participation in parts of some concerts. Rick Asher remained as artistic director during the 1991-92 season when the Chorale undertook a full year search for a permanent conductor. That year, Judith Burns, Linda Scheuffele and Karen Thomas each conducted one term in a "Showcase of Conductors". Linda Scheuffele Frost was selected as Artistic Director/Conductor in 1992 and served until 2001. Under her direction, the choir's standards of performance continued to grow, highlighted by a two-week European tour singing American music by Bernstein, Copland, Barber and Foss, as well folk songs, hymns and spirituals. The tour began in Bach's birthplace, Eisenach, Germany, and continued to the Czech Republic and

Austria. One concert in Jaromarice Moravia was so well received that the Chorale was asked to sing five encores – just one example of the enthusiastic reception of the Chorale wherever it appeared.

In 2001, the Board created a special season to audition potential directors: Tim Fitzpatrick in the Fall and Allan Cline in the Spring. In June 2002 Dr. Allan Cline was selected to serve as Artistic Director/Conductor. Under his direction, the Whatcom Chorale created an instrumental ensemble, the Whatcom Chorale Sinfonia, to provide orchestral accompaniment for concerts as well as independent orchestral concerts. The Chorale continued to perform major musical works, including Mozart's Requiem, Beethoven's Ninth Symphony, and Orff's Carmina Burana. Expanding the Chorale's repertoire, Dr. Cline composed and directed numerous works for choir and orchestra, with performance rights granted to the Chorale in perpetuity. Under Dr. Cline, the Chorale's ambitious performance schedule included several joint performances in Bellingham and British Columbia with the Canadian Gloria Dei Chorale. Audiences and Chorale members took great delight in Dr. Cline's artistic creativity and in his energetic and expressive conducting style. Chorale members began considering options, venues and timing for a second European concert tour in 2008 or 2009.

Dr. Cline resigned from the Whatcom Chorale in June 2007 to pursue other endeavors in his home country of Canada. Board members put a hold on plans for a concert tour and began a search for an interim director. The Chorale Board of Directors was fortunate to hire Charles Peterson as interim director. As a teacher of singing, Mr. Peterson has taught on the voice faculties of Moody Bible Institute, Western Washington University (adjunct faculty), and St. Cloud State University in Minnesota where he directed the Concert Choir and served as director of the Opera Theater and chair of the voice department. At present, he has a private studio of voice in Seattle. Mr. Peterson is already well known to the Chorale through workshops he has conducted with the group; Chorale members are excited to begin work with him in September.

Purposes of the Strategic Planning Process

The Whatcom Chorale initiated a strategic planning process in the spring of 2007 for the purpose of:

- Identifying strengths of the Whatcom Chorale organization
- Identifying planning needs to ensure future health of the Whatcom Chorale organization

The Whatcom Chorale Board of Directors and other members of the strategic planning process anticipated that recommendations developed through this process would be utilized to develop an action plan to address specific needs. Dr. Cline's resignation provided an additional impetus to the planning process because of the Chorale's need to select a permanent conductor within the next one to two years.

Sources of Information

Information was elicited from Chorale members by means of the following activities:

- **Member Input:** During March 2007, members were asked to give written feedback (positive, negative, and/or neutral) regarding the Chorale to the board and to identify issues of most importance to them.
- **Board Input:** Members of the board completed a written survey to identify factors that promote or detract from the overall success of the Chorale organization, as well as their personal satisfaction as singers and board members.

Analysis of the Data

Responses from members and board members were compiled and summarized to protect the anonymity of the respondents. Each member of the board and other participants in the planning process were provided with copies of this data. All of the data was carefully read and considered and formed the basis for the recommendations contained in this report.

How to Read This Report

While the identification of planning needs was a major focus of the review process, the planning process participants also wished to identify strengths and successes of the Chorale. The report begins by identifying positive aspects of our organization, as reported by the respondents.

The strategic planning process identified three broad areas in which work may be needed. Within each of these categories, factors were identified that appear to contribute to limitations in the success of the Chorale or to satisfaction of participants and audiences. A consistent format has been followed in the report to assist in understanding the conclusions and recommendations for future activities. The following information is presented for each of the three categories identified as Planning Themes:

- **Planning Theme Statement**
- **Goal Statement**
- **Recommended Steps to Achieve the Goal**

IDENTIFIED STRENGTHS IN THE WHATCOM CHORALE ORGANIZATION

Input provided to the Board of Directors by Whatcom Chorale members identified many areas of strength in our organization that lead to member and audience satisfaction. These include:

The Whatcom Chorale provides a challenging and satisfying musical experience for musicians. Factors that contribute to this positive climate include:

- High level of commitment by most members of the group.
- Creative and talented directors.
- Directors are positive and supportive in rehearsal and performance.
- Opportunities provided for varying levels of support in learning music.
- Group is supportive of different skill levels among members.
- Good choice of music.
- Group includes many talented musicians.
- Addition of Sinfonia has contributed to quality performances and repertoire of pieces we can perform.

The Whatcom Chorale provides quality musical performances for our audiences. Members reported the following feedback from audience members:

- Many performances have been impressive!
- Audiences have enjoyed the positive energy of conductors, singers, and instrumentalists.
- For the most part, audiences enjoy the choices of music.
- The Sinfonia has added depth to the Chorale and expanded the Chorale's ability to perform challenging repertoire.
- High quality of soloists is appreciated.

The Whatcom Chorale functions well as an organization as a result of:

- Willingness of members to volunteer for many tasks needed to pull off rehearsals and performances (fundraising, publicity, ticket sales, stage management, venue set-up and tear-down, planning of social activities, transportation of non-driving members, etc.)
- Hard-working and dedicated Board of Directors.

PLANNING THEME RECOMMENDATIONS FOR THE WHATCOM CHORALE

Utilizing data generated by members of the Whatcom Chorale, the Board of Directors also identified areas in which further planning would be of benefit to the organization. These areas were clustered into three broad categories as follows:

- **Financial health** of the Chorale, in terms of income generated and expended.
- **Roles and responsibilities** of Chorale and Sinfonia members, artistic directors, and the Board of Directors.
- **Artistic vision** related to target audience, selection of music, composition of Chorale and Sinfonia musician groups, and future musical goals.

Responding to some of the recommendations contained in this report will be the primary responsibility of the Board of Directors. Implementation of other recommended actions will require broader involvement of the members of the Chorale organization and its artistic directors.

Planning Theme I: Financial Health

Planning Theme Statement:

Our organization generates income from fundraising and ticket sales to support the cost of operations and performances. Factors that limit our ability to raise sufficient funds include:

- Funds raised rely primarily on Chorale members' sales of ads and individual solicitation of donors, and occasional fundraising events.
- We lack a focused plan to recruit donors, especially with respect to corporate or large private sponsors or donors.
- Publicity has not succeeded in achieving full-house audiences.
- Operating expenses for music, player or soloist honorariums, venue rental fees and other expenses have sometimes exceeded our income.

Goal Statement:

The Whatcom Chorale generates sufficient income from historical and expanded sources of revenue and judiciously manages its resources to support high quality artistic performances.

Recommended Steps to Achieve the Goal:

1. Identify a core group of strategists to develop a comprehensive and assertive annual fundraising plan that includes some of the following possibilities:
 - Fall member fundraising campaign to sell program ads and solicit individual donations
 - Recruitment of corporate, foundation, and individual concert sponsorship donations
 - Application for Whatcom County Tourism grants, with possible grant-writer assistance
 - Fund-raising events such as catered dinners, excursions, and silent auctions
 - Sale of season tickets
 - Performance by youth musicians in and before concerts
 - Sales of refreshments at concert intermission
 - Inclusion of Sinfonia members in fundraising activities
2. Appoint an expanded publicity committee to "tell our story" and review and revise concert publicity strategies.
3. Expand opportunities for community members with fundraising and/or marketing expertise to consult with or to serve on the board.
4. Gather input from former Chorale members and other organizations (e.g., Whatcom Symphony) with knowledge of successful fund-raising strategies.

5. Provide regular (at least quarterly) feedback on our financial status to all members of the Chorale.
6. Review position descriptions and compensation levels of artistic director/conductor, assistant conductor, and accompanist.
7. *Organize a “Friends of the Chorale” group to support the Chorale organization and performances.*

Planning Theme II: Roles and Responsibilities

Planning Theme Statement:

Currently, some confusion and dissatisfaction exists among stakeholders¹ of the Chorale concerning the roles and responsibilities of members, the Board of Directors and the artistic directors in terms of:

- Communication to Chorale members in regard to activities and decisions made by the Board
- Expected contributions of Chorale members to the musical and non-musical functioning of the organization
- Expectations regarding the quality of musical performance desired
- Musical readiness for concert performances
- Performance readiness in other areas, e.g., professional appearance
- Relationship of Sinfonia to the Chorale

Goal Statement:

With clear and timely communication, all stakeholders¹ in the Whatcom Chorale have adequate knowledge to effectively carry out their roles and responsibilities as musicians and otherwise, and have sufficient opportunities to contribute to the operations and organizational well being of the Chorale.

Recommended Steps to Achieve the Goal:

1. Communication:

- Develop structured means of communication between the Board and Chorale membership in regard to financial and artistic decisions and other Chorale business. Suggested formats include:
 - E-mail, blind copy, paper copies for members without e-mail
 - Board highlights and financial updates as part of quarterly newsletter

¹ Stakeholders in the Whatcom Chorale and Sinfonia include but are not limited to singers, instrumentalists, artistic director/conductors, accompanist, board members, volunteer coordinators, and committee volunteers.

- Members-only section on Chorale website

2. Chorale Member Responsibilities:

- Explore strategies to increase involvement of Chorale members in volunteer roles, e.g.:
 - Identification of tasks requiring volunteers
 - Development of a Board vision of how to share responsibilities with Chorale members
- Define and activate role of section leaders
- Explore strategies to effectively incorporate new members, e.g.,
 - Orientation before first rehearsal
 - Assignment of a buddy for each new member

3. Board Responsibilities:

- Review and revise, if needed, artistic directors' contracts and Board procedures in regard to musical decisions and timelines.
- Review and revise board meeting operating procedures (e.g., time and place of meetings, focus of meeting agendas, implementation of discussion "ground rules").
- Implement yearly employee evaluation procedures to provide feedback to artistic directors and accompanist.
- Clarify relationship of Chorale with instrumentalists and Chorale members.

4. Responsibility for Musicianship:

- Review and revise member handbook to include information concerning responsibilities of members and artistic directors in regard to concert preparation, assistance in learning music, etc.
- Set clear timeline expectations for singer responsibilities regarding music preparation.
- Expand options for concert preparation, e.g., sectionals, practice CDs, and websites.

Planning Theme III: Artistic Vision

Planning Theme Statement:

The Whatcom Chorale organization does not have a clear understanding of who we currently are or an articulated vision of what we want to become in the future.

Factors to be addressed include:

- Musical niche in community
- Musical programming
- Selection of permanent artistic director and conductor
- Selection of musicians
- Role of Sinfonia
- Number and locations of concerts

Goal Statement:

The Whatcom Chorale Board of Directors, in conjunction with the Artistic Director/Conductor, uses the input of Chorale, Sinfonia, and audience members to clearly define its artistic objectives and make decisions consistent with those objectives in the selection of musicians, musical programming, and Artistic Director/Conductors.

Recommended Steps to Achieve the Goal:

1. Maintain integrity of musical experience for members and audience by optimizing the number of programs per year and the use of rehearsal time.
2. Articulate the “Artistic Objectives” mentioned in the Goal Statement.
3. Justify the Goal Statement with the Chorale’s by-laws, contracts, and Mission Statement.
4. Develop strategies to gather input from Chorale stakeholder groups by:
 - Surveying audience members (web-based or paper)
 - Developing a survey and/or providing opportunities for structured group conversations to elicit the views of Chorale and Sinfonia members in regard to our artistic vision.
5. Unpack the meaning of ‘Community Chorus.’ Consider rewording to: “Community-based auditioned Chorale”.
6. Develop musicianship in the Chorale by:
 - Targeting ‘mixed formation’ as a way to strengthen blend
 - Encouraging Artistic Director/Conductor to be proactive in recommending ‘next steps’ to singers with less than the desired tone quality
 - Implementing strategies to improve individual and group tone
7. Define and articulate the role of the Sinfonia.
8. Maintain the historic precedence of performing ‘major’ works.
9. Consider limiting the number of Chorale members to between 85 and 100.

10. Continue to encourage the recruitment of younger Chorale members.
11. Appoint a Chorale historian to communicate who we are and how the Chorale has developed over time.
12. Review/revise/implement procedures for Chorale input in the selection of music.
13. Review/revise/implement procedures for selection of singers, soloists, and artistic director/conductors.
14. Review/revise interview questions to be used in selection of next artistic director.